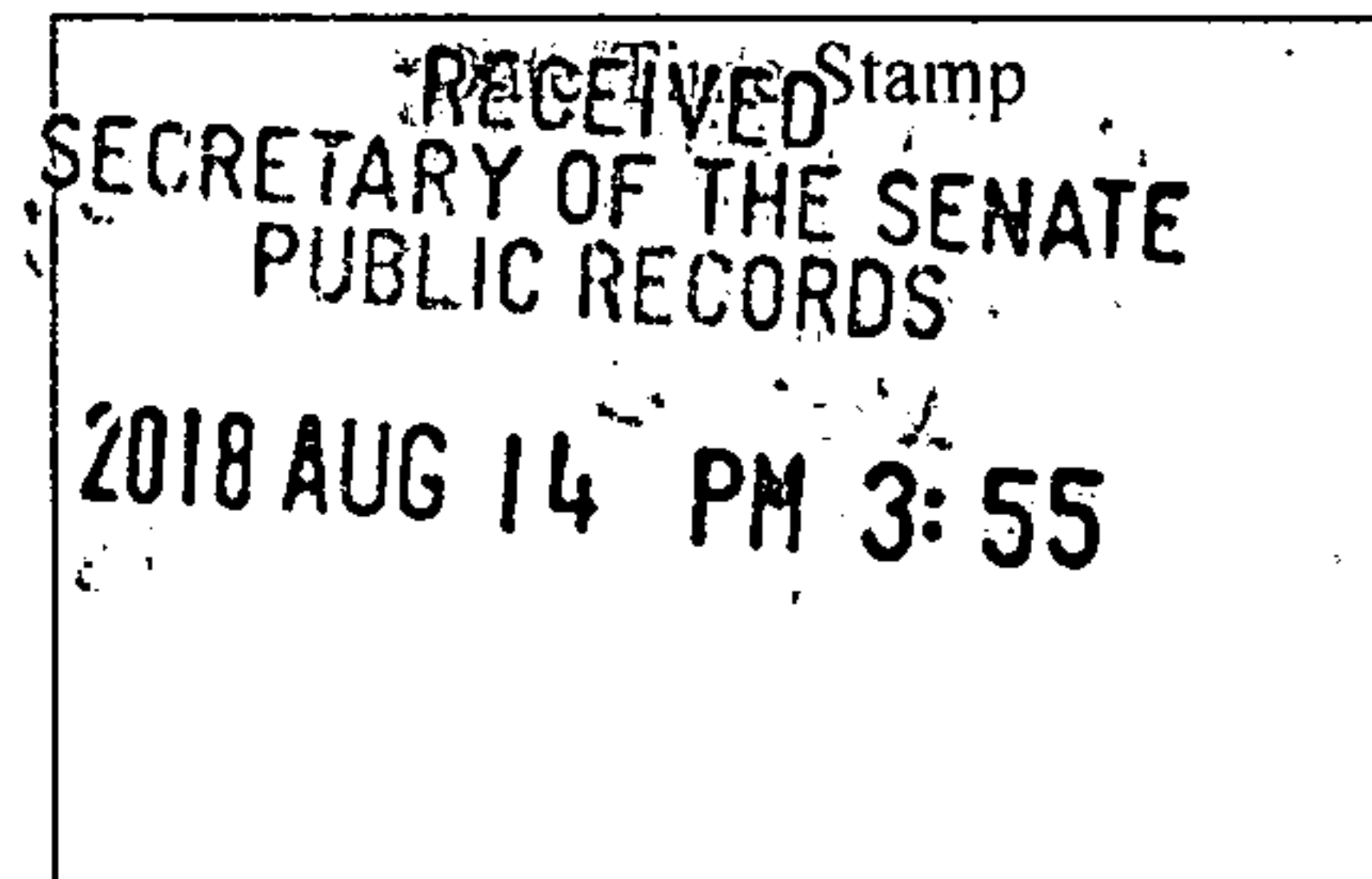


COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION



Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the **Office of Public Records** in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Andrew Kalaris

Employing Office/Committee: Senator Tim Kaine

Travel Expenses Paid by (List all sources): Partnership for a Secure America

Travel Date(s): May 12-13, 2018

Description/Title of Attached Forms: Private Sponsor Travel Certification Form

Purpose of Amendment (describe the reason for amending original submission): _____

Private Sponsor Travel Certification Form was not included as part of post-travel submission.

14 AUG 2018
(Date)

Andrew Kalaris
(Signature of Traveler)

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United States Senate

SELECT COMMITTEE ON ETHICS

May 4, 2018

Andrew Kalaris
Office of Senator Tim Kaine
United States Senate
Washington, DC 20510

Dear Mr. Kalaris:

This responds to your recent correspondence concerning an invitation you received to travel to a foreign policy and national security program in Warrenton, Virginia, on May 12-13, 2018, sponsored by the Partnership for a Secure America (PSA). PSA certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*¹ related to the travel and that it is neither a lobbyist, nor lobbying firm, nor an agent of a foreign principal, and it is not otherwise acting as a representative or agent of a foreign government. PSA has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist will accompany you at *any point throughout your trip*.²

Based on information and materials available to the Committee, and assuming the **actual** travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip **may be accepted** under relevant Senate Rules and the Committee's *Regulations and Guidelines for Privately-Sponsored Travel*, so long as at the time of the payment or reimbursement, PSA is neither a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel*

¹ The term "necessary expenses" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

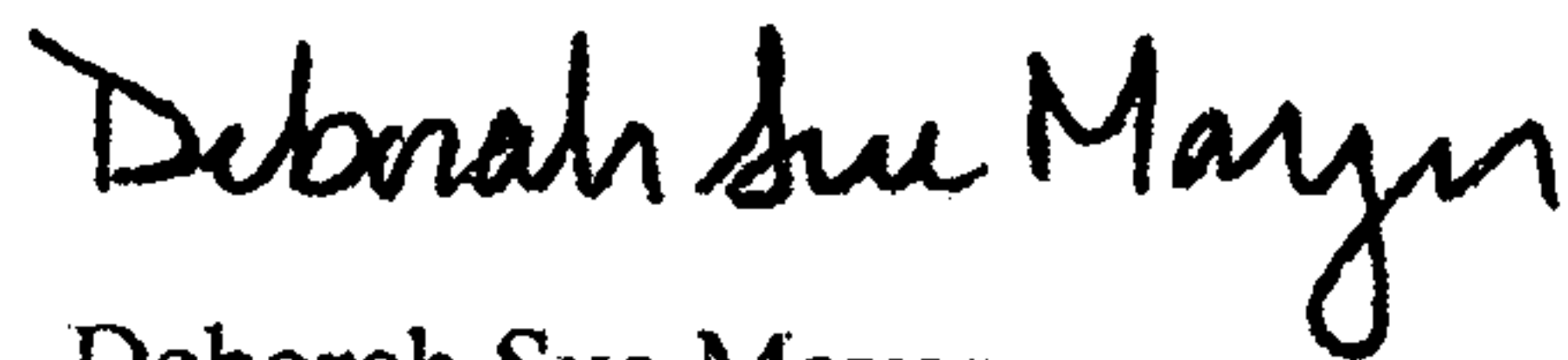
² The term "any point throughout your trip" has a specific definition. See *id.* at 2.

Certification Form, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel**.

Finally, Senate Rule 34 requires a reporting individual,³ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Deborah Sue Mayer
Chief Counsel and Staff Director

Enclosure: Travel Checklist

00000000004657

³ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$126,148 for CY 2018) or is a political fund designee and is required to file Financial Disclosure Reports.

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC APR 6'18PM 4:25

Name of Traveler: Andrew KalarisEmploying Office/Committee: Senator Tim KainePrivate Sponsor(s) (list all): Partnership for a Secure AmericaTravel date(s): May 12, 2018 to May 13, 2018*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*Destination(s): Airlie Conference Center; Warrenton, Virginia

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip is part of the Partnership for a Secure America's Congressional Partnership Program, which promotes bipartisan cooperation and understanding between national security staff members in the Senate. As the Legislative Correspondent for defense and foreign policy issues, this trip will help me better understand national security issues affecting Virginians, and Senator Kaine's work on the Senate Armed Services and Senate Foreign Relations Committee.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

28 MARCH 2018
(Date)

Andrew Kalaris
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3/28/18
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):
Partnership for a Secure America
2. Description of the trip: Congressional staff weekend of foreign policy and national security lectures.
3. Dates of travel: May 12-13, 2018
4. Place of travel: Airle Conference Center, Warrenton, VA
5. Name and title of Senate invitees: See Attached List
6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
– OR –
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
– AND –
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
– AND –
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) is solely responsible for planning and conducting this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring together staff from both parties to build cross-party relationships and discuss diverse perspectives on pressing issues in the national security and foreign policy arena.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This will be the eighteenth such trip of this nature.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics. These statements are generally available to the public.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$35 (Coach Bus)	\$90 (For One Night)	\$77 (For 2 days)	\$191 conference services (over 2 days). This includes cost of breakout room, A/V equipment, and incidental snacks/refreshments.

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

It is close to Washington, DC, but also provides a remote setting that will encourage participants to step outside their daily roles as Senate staff.

19. Name and location of hotel or other lodging facility:

Airle Conference Center, 6809 Airle Road, Warrenton, VA 20187.

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington, DC for a one night trip. The lodging and conference location is all the same.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meals and lodging are below the per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will be transported by a coach class bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: _____

Name and Title: Nathan Sermonis, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1629 K Street NW, Suite 450, Washington, DC 20006

Telephone Number: (202) 293-8580

Fax Number: N/A

E-mail Address: sermonis@psaonline.org

Kalaris, Andrew (Kaine)

From: PSA Congressional Program <cpp@psaonline.org>
Sent: Monday, March 26, 2018 12:30 PM
To: Kalaris, Andrew (Kaine)
Subject: Spring 2018 CPP - SENATE ETHICS DOCS
Attachments: Senate Ethics Instruction Sheet.docx; Private Trip Sponsor Form.pdf; Retreat Itinerary.docx; List of Participating Senate Staff.docx; Employee Pre-Travel Authorization Form.pdf; Employee Privately-Sponsored Travel Checklist.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Andrew,

Thank you for participating in the Spring 2018 session of the Congressional Partnership Program. We look forward to working with you in the coming months.

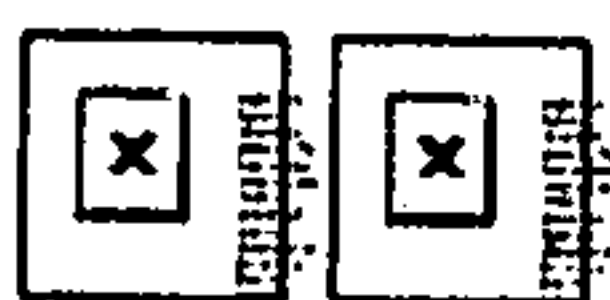
As you are aware, every session the Congressional Partnership Program involves a weekend retreat. This session will be held on the weekend of May 12-13, 2018 at the Airlie Conference Center in Warrenton, Virginia. I would like to take this opportunity to offer you a formal invitation to attend the retreat. Please be certain to submit this email and the attached documents to the Senate Ethics Committee by **COB April 12th** in order to participate.

If you have any additional questions or concerns, please do not hesitate to call me.

Best regards,

Nathan Sermonis
Executive Director
Partnership for a Secure America
1629 K Street NW, Suite 450
Washington, DC 20006
202-293-8580
cpp@psaonline.org

Partnership for a Secure America
1629 K Street NW, Suite 450
Washington, DC 20006
(202) 293-8580



PSA is a nonprofit founded by former U.S. Representative Lee Hamilton (D-IN) and the late former U.S. Senator Warren Rudman (R-NH) to advance bipartisanship on today's critical national security and foreign policy challenges. Leveraging the leadership of its distinguished Advisory Board, PSA has

unique credibility and access to forge common ground and fashion thoughtful, fact-based policy that promotes America's national interests. More information on PSA can be found at www.psaonline.org.

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PARTNERSHIP FOR
A SECURE AMERICA

Congressional Partnership Program
Spring 2018
Senate

All invited congressional staff members handle foreign policy and national security topics in their professional office capacity.

Asher Allman

Sen. Roy Blunt
(R-MO)

Edward Linczer

Sen. Tom Cotton
(R-AR)

Brian Canfield

Sen. Jeff Flake
(R-AZ)

Sam Mulopulos

Sen. Rob Portman
(R-OH)

Courtney Cardin

Senate Committee on Homeland
Security and Governmental Affairs

Linden Olberg

Sen. Deb Fischer
(R-NE)

Courtney Davis

Sen. Michael Bennet
(D-CO)

Jake Proctor

Sen. Joni Ernst
(R-IA)

Anna Diederich

Sen. Heidi Heitkamp
(D-ND)

Louie Reckford

Sen. Jeff Merkley
(D-OR)

Felipe Galvis-Delgado

Sen. Martin Heinrich
(D-NM)

Daniel Stapelkamp

Sen. Robert Menendez
(D-NJ)

Andrew Kalaris

Sen. Tim Kaine
(D-VA)

Michelle Woods

Senate Committee on Homeland
Security and Governmental Affairs

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Congressional Partnership Program Retreat Spring 2018

Saturday, May 12th

1:30 pm	Depart from Union Station, Washington, DC
3:00 – 4:00 pm	Arrive at Airlie Conference Center & Check-in
4:00 – 5:00 pm	Material Review and Preparation
5:00 – 5:30 pm	Opening Remarks and Review of Agenda: Nathan Sermonis, PSA
5:30 – 7:00 pm	Airlie House – Meadow Room Guest Speakers: To be Determined Topic: Bipartisan Panel on Magnitsky Act
7:00 – 7:30 pm	East Room Pre-Dinner Reception Informal conversations with guest speakers
7:30 – 9:00 pm	East Room Keynote Dinner Guest Speaker: John McLaughlin, former Deputy Director of the CIA (INVITED) Topic: Global Challenges for Today and Tomorrow
9:00 – 10:00 pm	East Room After-Dinner Reception Informal conversations with guest speakers

Congressional Partnership Program Retreat Spring 2018

Sunday, May 13th

8:00 – 9:00 am	Airlie House – Dining Room Breakfast
9:00 – 12:00 pm	*Group A* Airlie House – Meadow Room National Security Council Simulation National Security Advisor: Mr. Robert Sheldon, Director for Policy – Emerging Threats at the Business Executives for National Security (INVITED)
9:00 – 10:30 am	*Group B* Airlie House – Studio Guest Speaker: Ms. Bonnie Glaser, Senior Advisor for Asia, CSIS Topic: The Future of US-China Policy
10:30 – 12:00 pm	*Group B* Airlie House – Studio Guest Speaker: Melinda Haring, Editor of the UkraineAlert Blog at the Atlantic Council & Thomas Carothers, Senior Vice President for Studies at the Carnegie Endowment for International Peace Topic: Does Democracy Matter?
12:00 – 1:00 pm	Airlie House – Dining Room Lunch
1:00 – 2:00 pm	Informal conversations with guest speakers
2:00 – 5:00 pm	*Group B* Airlie House – Meadow Room National Security Council Simulation



National Security Advisor: Mr. Robert Sheldon,
Director for Policy – Emerging Threats at the
Business Executives for National Security
(INVITED)

Topic: The Future of US-China Policy

Topic: Does Democracy Matter?

Airlie House – Meadow Room

Wrap-up and Departure from Airlie

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